

DYNAMIC MAILBOX

CONFIGURATION GUIDE





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Solution Import

Please follow the below steps in order to start the import process:

1. Go to the "download" button on the solution page and download the latest managed solution zip file.

Download Dynamic Mailbox	×
CRM 2016/Dynamics 365	
Version 1.0.0.1	

2. Login to your Microsoft Dynamics CRM/365 organization and head to Settings -> Solutions and click on the "Import" button.

	Dynamics 365 🗸	Settings	∽ Soluti	ons >		
	Solutions ~		-		-	
🐉 New	X Delete	Export In Clor	ne a Patch 🛛 🔢	Clone Solution	Apply Solution Upgra	de 🛛 👰 Import Translations
Nam	ne Displa	/ Name	Version	Installed On \downarrow	Package Type Publi	isher

3. Select the solution file that you downloaded in Step 1 and Press Next.

4. Verify that you imported the correct Solution by checking the solution information and package details and press "Next".



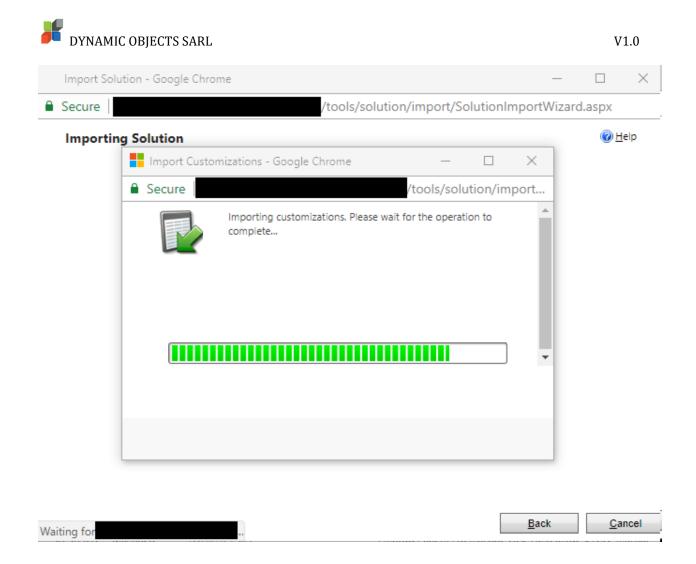
Import Solution - Google Chrome	-		×
Secure /tools/solution/import/SolutionImport	Wizard	.aspx	
Select Solution Package		@ <u>H</u> e	elp
Select the compressed (,zip or .cab) file that contains the solution you want to import and click Next. Choose File DynamicMailbox_1_0_0_0_managed.zip			
<u>B</u> ack <u>N</u> e	xt	<u>C</u> ar	ncel

5. Please make sure that the <u>"Enable any SDK message processing steps included in the solution" option</u> <u>is selected</u> and select "Import".



Import Solution - Goog	le Chrome —		×
Secure	/tools/solution/import/SolutionImportWizard	.aspx	
Solution Informati	on	@ <u>H</u> e	elp
Solution Informatio	n		
Name:	Dynamic Mailbox		
Publisher:	Dynamic Objects(dynamicobjectssarl)		
Package Type:	Managed		
View solution packa	ge details		
external systems	command, you consent to share your data with an external system. Data imported from into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed ult the feature technical documentation for more information.		
	<u>B</u> ack <u>I</u> mport	<u>C</u> ar	ncel

6. The Solution import process will start. Please wait around 5 minutes for the solution import process to complete.



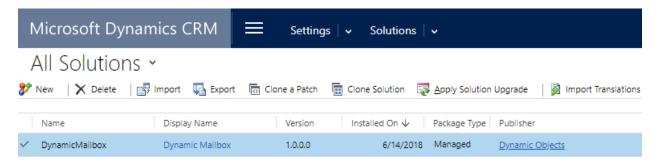
7. Once the import is complete, you will see a screen with an overview of the import and components. Please select close and proceed to Solution Registration.

DYNAMIC OBJECTS SARL

Import Solution - Goo	ogle Chrome				-	
Secure		/tools/so	olution/import/So	olutionImpo	rtWizard.a	spx
Importing Solution	on					@ <u>H</u> elp
1 The import of	solution: Dynamic Mai	lbox completed succe	essfully.			
Date Time ψ	Туре	Display Name	Name	Status		
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08:20:59.43	Client Extensions	Site Map			х	
08:20:46.01	Chart		do_dynamicmail		Er	
08:20:45.87	Entity Ribbon	Dynamic Mailbo	do_dynamicmail		х	
08:20:45.54	Entity Messages		do_dynamicmail		Te	
08:20:45.52	Form	Dynamic Mailbo	do_dynamicmail		Sy	
08:20:44.37	System Views	Dynamic Mailbo	do_dynamicmail		Q	
08:20:35.41	Relationship					
08-20-35-02	Suetam Viaure	Dynamic Mailho	do dynamicmail		- P -	
				H A	Page 1	
					,	
				Download	Log File	<u>C</u> lose

Solution Registration

1. When the import process is complete, please double click on the solution imported to start the registration process.



2. Please fill-in your details in the "Information" section and make sure to enter the correct email details in order to receive important updates about the solution.



Solution: Dynamic Mailbox - M	licrosoft Dynamics CRM - Go	oogle Chrome			-	
 Not secure 	/too	ls/solution/edit.aspx?id=%7bB0004558-	D36F-E811-812E	-00155D00660A%7d#	ŧ	
File 🛃 🥁 Save and Close	🖺 🛛 📮 Export Solution	🛛 🎲 Translations 🕶 🛛 👔 Publish All Customiz	itions 🐌 Prepa	are Client Customizations	<u>∕&A</u> ctions -	
Solution: Dynamic Mailbo	x					
Solution Dynamic Mailbox 2 Information Configuration	Dynami Objects	c		Registration Status Trial	Expires 11/5/2045	
 Components ▷ → Entities → Option Sets → Client Extensions 	Register Configuratio	n RM Credentials				
	Try Subscribe Information					
Dashboards	First Name*		Address*			
Sconnection Roles Article Templates Contract Templates	Last Name* Company*		City* State/Province*	•		
Email Templates	Email* Main Phone*		Postal Code* Country*			
 Second y Roles Field Security Profiles 	Credentials Please provide valid login cre	edentials to your CRM organization				
Status: Existing	Username*		Password*			

In the "Credentials" section, please type in the appropriate user with the required security role which will be used to renew your subscription. This user needs to be allocated the "Dynamic Mailbox– Service User" role.



Once all the information is entered, please click "Submit" and you are subscribed for the 30-day trial.



Solution: Dynamic Mailbox - Mi	crosoft Dynami	ics 365 - Goo	gle Chrome				-
Secure		/tools	s/solution/edit.aspx?id=%7b22A6A76C-AB3C-40C1-96FF-96A9464ED5C3%7d				
File Close 🕮 🕮 Sho	w Dependencies	s 🎪 <u>A</u> ction	5 ×				
Solution: Dynamic Mailbo	х						
You cannot directly edit the comp	onents within a	managed solu	tion. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from and	ther unmanaged solution.			
Solution Dynamic Mailbox Standard Information)ynami)bjects				Registration Status Trial	Expires 7/16/2018
Components Description Sets		Configuratio	99				
Client Extensions Web Resources Concesses Concesses Concesses Concesses Concessing Study Message Processing Study Service Endpoints	Submit Try Subs	scribe 🔘					
Dashboards Reports	First Name*		John	Address*	Samoria One Building		
Sconnection Roles	Last Name* Company*		Do Dynamic Objects	City* State/Province*	Batroun		
Contract Templates Email Templates Mail Merge Templates	Email*		john_do@dynamicobjects.net	Postal Code*	1400		
Security Roles	Main Phone		+9616741343	Country*	Lebanon		
P Routing Rule Sets Q Record Creation and Upda SLAs	Credent Please provide		edentials to your CRM organization				
Paps 🔁 Apps	Username*		john_do@dynamicobjects.net	Password*			

Solution Configuration

Now that you successfully registered your solution, you need to click on the **Configuration** tab to configure navigation entities, you can select up to 5 entities.

lution Dynamic Mailbox	Dynamic	
🕈 Information 🔶	Objects	
Configuration		
Components		
Entities	Register Configuration	
Option Sets		
Client Extensions	Save	
Web Resources		
🛃 Processes	Configuration	
> + Plug-in Assemblies	comgaration	
Sdk Message Processin	Nector Faite 1	•
🍓 Service Endpoints	Navigation Entity 1	•
🔠 Dashboards		
	Navigation Entity 2	•
Reports		
Reports	Navigation Entity 2 Navigation Entity 3	•
	Navigation Entity 3	
Connection Roles	Navigation Entity 3 Navigation Entity 4	
Connection Roles	Navigation Entity 3	

Click Save once you are done.

Solution Subscription

The trial solution will expire after 30 days; thus, you need to subscribe in order to continue using the solution features. The steps are as follows:

- 1. 1. Under Register section click Subscribe.
- 2. In the Payment Plan section, select your preferred payment plan Monthly or Yearly.
- 3. In the **Billing Address** Section, Enter the billing address. You can use the **Copy Address Above** button to automatically copy the address details entered above or enter a different billing address.

Components	Register Configuration	n		
Option Sets Client Extensions	🖬 Submit 👂 Test C	RM Credentials		
Web Resources Processes Processes Processes	Try 🔘 Subscribe 🖲			
📃 Sdk Message Processing St 🍓 Service Endpoints	Information			
Dashboards	First Name*	John	Address*	Samoria One Building
Reports	Last Name*	Do	City*	Batroun
Connection Roles	Company*	Dynamic Objects	State/Province*	NL
Contract Templates	Email*	john_do@dynamicobjects.net	Postal Code*	1400
Mail Merge Templates	Main Phone*	+9616741343	Country*	Lebanon
 Security Roles Field Security Profiles I⁺ Routing Rule Sets Q. Record Creation and Upda 	Credentials Please provide valid login cre	edentials to your CRM organization		
R SLAs	Username*	john_do@dynamicobjects.net	Password*	
Apps Custom Controls G. Virtual Entity Data Providers Virtual Entity Data Sources Wrobile Offline Profiles	Payment Plan			
	Billing Address			
	Copy Address Above			
	Address Line 1*		State/Province*	
	Address Line 2		Postal Code*	
	City*		Country*	
	Card payments secured			

4. Once **Plan** is selected and the billing fields are filled, press the **Submit** Button and you will be presented with the End User License agreement. Please read it carefully and press **Accept** to continue to the payment page.



Configuration			
Configuration Components Components Components Components Components Configuration Web Resources Processes Confection Assembles Configuration Reports Connection Roles Article Templates Contract Templates Contract Templates Field Security Profiles Field Security Profiles Field Security Profiles Concord Creation and Upda Collars Apps Mail Mobile Offline Profiles	End User License Agreement PLEASE READ THIS AGREEMENT CAREFULLY BEFO BUTTON. BY CLICKING THE "ACCEPT" BUTTON BELOW AND ACKNOWLEDGE THAT YOU HAVE READ THIS AGR AND AGREE TO BE BOUND BY IT. IF YOU DO NOT THIS AGREEMENT, YOU SHOULD NOT UTILIZE TH LICENSE SHALL HAVE BEEN GRANTED THERETO. THIS END USER LICENSE AGREEMENT ("AGREEME DYNAMIC OBJECTS SARL (THE "COMPANY") AND SUBSCRIBES TO THE SOLUTION PROVIDED WHIC AGREEMENT (THE "USER"). THIS AGREEMENT GIV ACCESS AND USE THE COMPANY'S SOLUTION TH THE COMPANY. THE COMPANY IS WILLING TO GRANT THE USER AND USE THE COMPANY'S SOLUTION (ONLY IF T	DRE CLICKING THE "ACCEPT" D USING THE SERVICE, YOU REEMENT, UNDERSTAND IT, I AGREE TO THE TERMS OF HIS SOLUTION BECAUSE NO ENT") IS BETWEEN O THE PERSON WHO HA ACCOMPANIES THIS VES THE USER THE RIGHT TO HAT IS SUBSCRIBED FROM THE RIGHT TO ACCESS	
Status: Existing			

5. The payment page lists the amount that you will be billed depending on your selected plan (Monthly or Yearly).

Enter your Card Number, Expiration Date, CVV and Cardholder Name and press the Pay Button.

Note: We currently support only visa and Mastercard as payment methods.



- A	Dynamic Objects Payment Amount
10	15.00 usp
	MM/YY CVV 05/21 123 Cardholder Remo DO
24	Pay DSS PAY FORT

If the payment is Successful, you will be routed to the **Configuration** Page and the solution is extended for another period as per your selection (Month or Year).

The **Payment Method** section lists the masked card details so you keep track of the payment details used.

Please note that the solution will automatically renew every month/year on the expiration date.

If you wish to stop using the solution, please click on the **Unsubscribe** button and confirm.

The solution will remain active until the expiry date.